State of Washington

## **Department of Retirement Systems**

## **Plan 3 Change of Investment Program**

Use to change the investment program to which your contributions are sent

Department of Retirement Systems

PO Box 48380

Olympia, WA 98504-8380
Toll Free: 1-800-547-6657
Local: 360-664-7000
TDD: 360-586-5450

Return completed form to your employer

Section 1: Personal Data - To Be Completed by Member																				
Social Security	SERS TRS Check your Retirement System																			
Last Name	Last Name																			
First Name																				
Middle Name Maiden Name																				
Section 2: Change of Investment Program - To Be Completed by Member																				
To obtain more detailed information about an investment program consult the <i>Plan 3 Investment Guide</i> . Investment guides are available from your employer or through ICMA-RC (1-888-711-8773).  Place a check mark in the box next to the investment program you choose.  Direct my future contributions to the <b>Washington State Investment Board (WSIB) Investment Program</b> .  Direct my future contributions to the <b>Self-Directed Investment Program</b> . You can select the allocation of your contributions by contacting ICMA Retirement Corporation (ICMA-RC) at 1-888-711-8773 or by accessing their Web site (http://www.icmarc.org/plan3).  Any contributions made prior to this change and the earnings generated by those funds will remain in the current investment program																				
Any contributions made prior to this change and the earnings generated by those funds will remain in the current investment program unless you request that they be transferred. To transfer fund balances between investment programs contact ICMA-RC toll-free at 1-888-711-8773 from 5:30 a.m. to 6:00 p.m. Pacific Time, Monday through Friday (on business days).    M M D D Y Y Y Y Y Y   Pacific Time   Date   Da																				

26 U.S.C. Sections 6047(D), 6041(A), and 6109(A)(3) authorize DRS to solicit your Social Security Number.

- DRS uses your Social Security Number to ensure that any amounts disbursed under your account are properly reported to the Internal Revenue Service and as a reference number for tracking all data with regard to your retirement account.
- Routinely, DRS uses the Social Security Number as the identifying number for the member file.
- If you do not provide your Social Security Number, DRS cannot guarantee that the information you are providing on this form will be properly matched with your member records. This is a particular risk if your name is a fairly common one. Failure to provide your Social Security number may also result in misreporting to the Internal Revenue Service any disbursements you receive, which may result in adverse tax consequences for you.
- · Because this form affects how DRS reports your disbursements to the IRS, the disclosure of your Social Security Number to DRS is mandatory.
- DRS will not disclose your Social Security Number to any party unless required by law.

DRS MS 146 (R5/00) WAS000-003-9703